



CPA

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# TESchmitt

Thomas E Schmitt & Company, LLC

## TRUST & ESTATE TAX & ADVISORY SERVICES



### Supporting You

- Explaining Basic Trust & Estate Administration Requirements & Terminology
- Tax Filings
- Trust Accounting to the Beneficiaries
- Working Closely with Your Attorney & Investment Advisor

## I've Been Named Executor or Trustee; Now What?

During one of the most stressful times of your life, you have a new, and possibly unexpected, responsibility placed on you. Decisions need to be made—and everyone is looking to you.

In addition to legal advice and investment management advice, you need trust administration, accounting, reporting and tax filing support.

We are here to help you with:

- Decedent's 1040, Trust/Estate 1041 Preparation
- Accounting & Administrative Compliance for Inexperienced Trustees & Executors



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